



# **Individual Development Planning (IDP)**

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## **Module: Coaches and Mentors**



## Individual Development Planning in SATERN

In addition to current capabilities available in SATERN to manage NASA training activities, employees can now access the IDP tool to document career goals and development activities to reach each goal.

Individual Development Planning (IDP) in SATERN provides automated functionality for mentors such as:

- Online access to mentee's IDP
- Electronic IDP feedback process

As a mentor or coach at NASA, you serve in an important role. Mentees and coachees will want to discuss their development plans with you and use you as a sounding board and advisor.

**The Agency acknowledges a distinction between the role of mentors and coaches. For the purpose of this IDP presentation we will use the term mentor to refer to both mentors and coaches. Similarly, the term mentee will refer to both mentees and coachees.**



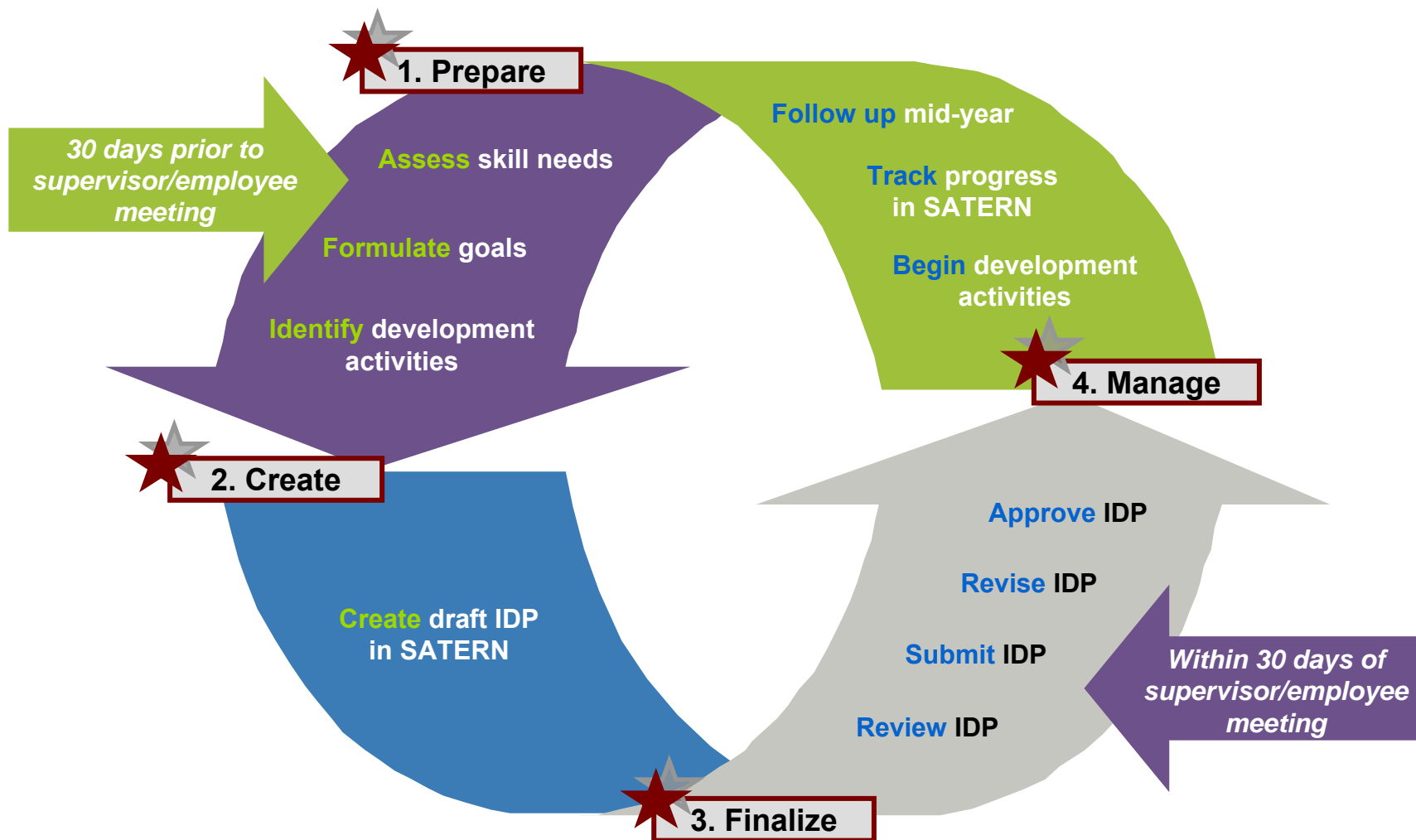
## Mentor Role in the IDP Process

The type of assistance that an employee requires during the IDP process is determined through formal or informal discussions with the mentor. The mentor and the mentee should agree in advance about what support is being requested and the timeframe for the support.

The Individual Development Planning process is comprised of four phases: **Prepare**, **Create**, **Finalize** and **Manage**. Mentors play a role in two of the four phases:

- **Phase 1: *Prepare for IDP***
  - Evaluate skill gaps and development needs
  - Identify training resources and developmental activities
  
- **Phase 3: *Finalize IDP***
  - Provide feedback on the draft IDP

# IDP Process Phases





## Prepare Phase Activities

The Individual Development Planning process begins with planning and preparation. In the first phase of the IDP process, you will assist your mentee as he/she prepares to create his/her plan.

When the mentee is in the process of preparing for the IDP, the mentor may be called upon to assist with the following:

- Assessment of skill needs
- Assistance with goal setting
- Assistance identifying appropriate development activities

In the second phase, **Create**, the mentee will use the information from the **Prepare** phase to create a draft IDP in SATERN.



## Prepare Phase Activities (cont.)

As a mentor, you may be asked to provide the mentee with advice and counsel to help him/her determine career goals and how to reach them. Your role in encouraging and motivating the mentee can help him/her grow personally and professionally.

Actions you can take with your mentee:

- Provide direction and guidance regarding goal setting and researching development activities
- Share thoughts and ideas as well as any useful contacts
- Demonstrate openness and provide candid feedback about perceived strengths and developmental needs
- Coach the employee in enhancing skills and help clarify career goals
- Share organizational information (culture, politics, structure)
- Help the employee think strategically and link him/her with others who can enhance his/her learning



## Finalize Phase Activities

After the IDP is created and before it is finalized, you may be asked to review and comment on the draft plan that the mentee has created in SATERN. The mentor and mentee should discuss and agree on the following:

### **Feedback Format** – How should feedback be provided?

- Note comments in the online IDP tool
- Write comments on a printed draft
- Hold in-person meeting or phone conference

### **Target Dates** – When is the feedback expected?

- The date the draft IDP will be ready for review
- The target date for mentor comments

**Development activities are not limited to formal training or activities requiring an Agency expenditure of funds.**





## Finalize Phase Activities (cont.)

If you and your mentee have agreed that you will review the IDP online in SATERN, you should be aware that SATERN does not provide email notifications or alerts for coach/mentor functionality.

Mentors are not alerted when an IDP is ready for review in SATERN, and the mentee is not notified when the mentor has made comments. The mentor and mentee should agree on how to notify each other.

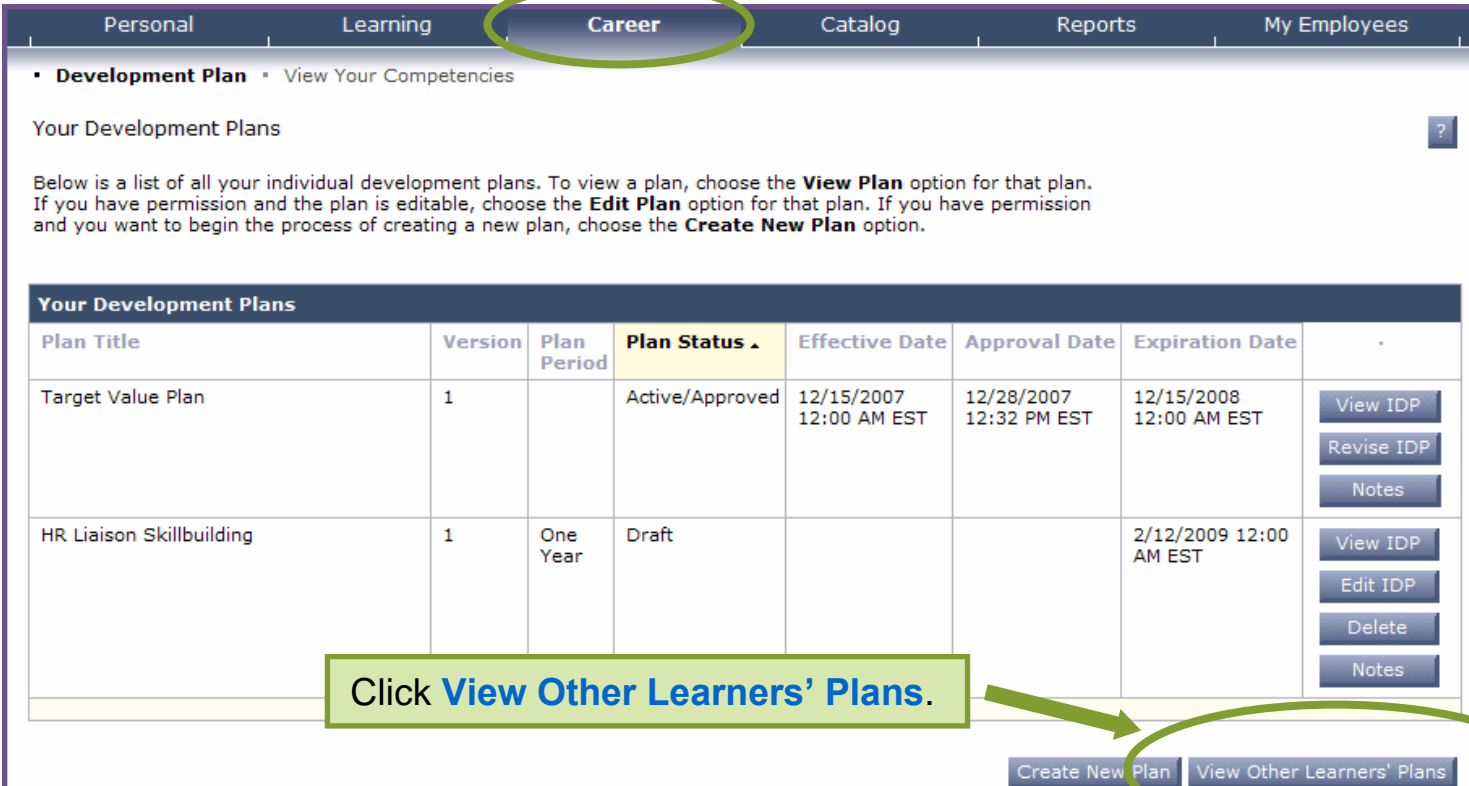
The following slides will walk you through the process of reviewing the IDP in SATERN, specifically how to:

- Select an IDP for Review
- View Plan Details
- Make Comments



## Select an IDP for Review

To review a draft IDP, log in to SATERN and click on the **Career** tab. In addition to your own IDP, you should also see an option to **View Other Learners' Plans**.



The screenshot shows the SATERN interface with the **Career** tab selected. Under the **Development Plan** section, there is a list of development plans. The first plan is 'Target Value Plan' with status 'Active/Approved'. The second plan is 'HR Liaison Skillbuilding' with status 'Draft'. For each plan, there are buttons for 'View IDP', 'Revise IDP', 'Notes', 'Edit IDP', and 'Delete'. At the bottom right, there are two buttons: 'Create New Plan' and 'View Other Learners' Plans'. A green box with an arrow points to the 'View Other Learners' Plans' button, with the text 'Click View Other Learners' Plans.' inside the box.

Personal Learning **Career** Catalog Reports My Employees

▪ **Development Plan** ▪ View Your Competencies

Your Development Plans ?

Below is a list of all your individual development plans. To view a plan, choose the **View Plan** option for that plan. If you have permission and the plan is editable, choose the **Edit Plan** option for that plan. If you have permission and you want to begin the process of creating a new plan, choose the **Create New Plan** option.

Plan Title	Version	Plan Period	Plan Status	Effective Date	Approval Date	Expiration Date	
Target Value Plan	1		Active/Approved	12/15/2007 12:00 AM EST	12/28/2007 12:32 PM EST	12/15/2008 12:00 AM EST	<a href="#">View IDP</a> <a href="#">Revise IDP</a> <a href="#">Notes</a>
HR Liaison Skillbuilding	1	One Year	Draft			2/12/2009 12:00 AM EST	<a href="#">View IDP</a> <a href="#">Edit IDP</a> <a href="#">Delete</a> <a href="#">Notes</a>

Click **View Other Learners' Plans**.

[Create New Plan](#) [View Other Learners' Plans](#)



## Select an IDP for Review (cont.)

The **Other Learners' Development Plans** page will list the development plans to which you have been granted access. In the far right column, a list of possible **Actions** will display.

Click **View IDP**. This will allow you to view the IDP and add comments.

Other Learners' Development Plans								
Learner Name	Plan Title	Version	Plan Period	Plan Status	Effective Date	Approval Date	Expiration Date	Action
Nasa, Joe	Systems Engineering Plan	1	One year	Draft	2/13/2008 12:00 AM EST		2/13/2009 12:00 AM EST	<a href="#">View IDP</a> <a href="#">Edit IDP</a> <a href="#">Delete</a> <a href="#">Notes</a>

Click **View IDP**.

Clicking **Review** brings you into the employee's plan in the **View/Add Notes** mode. Before moving forward to review the IDP, be sure to orient yourself.

## Select an IDP for Review (cont.)

You can tell whose plan you are viewing by the **Learner** name listed in the plan details. If you need to exit this employee's plan and return to your own documents, click **Home** or **View Other Plans**, which will return you to your main page.

Welcome Jane Nasa | Home | Search Catalog  Go | ? Help | Logout

Personal Learning Career Catalog Reports My Employees

▪ **Development Plan** ▪ View Your Competencies

### Individual Development Plan

The details of this individual development plan are shown below. If this plan is currently Active, you may update the status of certain activities and view or add notes to this plan. If you have permission and the plan is revisable, choose the **Revise** option. To select another development plan, choose the **View Other Plans** option.

**Learner:** Nasa, Joe  
Systems engineering plan

**Plan Period:** One year      **Expiration Date:** 1/10/2009 12:00 AM EST      **Coach/Mentor:** Nasa, Jane  
**Plan Status:** Draft      **Approval Date:**      **Plan Purpose:** To support a career shift to systems  
**Version:** 1 (This is the most recent version)      **Effective Date:** 1/10/2008 12:00 AM EST

View/Add Notes   Modify Plan   View Other Plans   View Other Learners' Plans

Clicking another tab while you are in another learner's plan will not return you to your plan.

## View Plan Details

To see the development activities listed under each goal, click the ► symbol to expand that section.

<a href="#">View/Add Notes</a> <a href="#">Modify Plan</a> <a href="#">View Other Plans</a> <a href="#">View Other Learners' Plans</a>					
<b>SHORT-RANGE GOALS: 1 YEAR</b>					
Goal Name ▲	Target Date	Priority	Related Competency	Target Rating	Action
► Systems Engineering (Level 1 Competency)	12/31/2008	3	Systems Engineering (Level 1 Competency)	1	<a href="#">View/Add Notes</a>
<b>MID-RANGE GOALS: 2 - 4 YEARS</b>					
Goal Name ▲	Target Date	Priority	Related Competency	Target Rating	Action
► Development of a perspective	12/31/2008	3			<a href="#">View/Add Notes</a>
<b>LONG-RANGE GOALS: 5 YEARS AND BEYOND</b>					
There are no goals defined for this section.					



## View Plan Details (cont.)

You can view further details about SATERN catalog items listed as development activities, including course descriptions, intended audience, and scheduled offerings.

**SHORT-RANGE GOALS: 1 YEAR**

Goal Name ▲	Target Date	Priority	Related Competency	Action	
▼ Systems Engineering	2/13/2009	3	Systems Engineering (Level 1 Competency)	<a href="#">View/Add Notes</a>	
<b>Description:</b>					
<b>Development Activities ▲</b>	<b>Type</b>	<b>Target Date</b>	<b>Priority</b>	<b>Target</b>	<b>Action</b>
APPEL-DEVELOPING AND IMPLEMENTING A SYSTEMS ENGINEERING MANAGEMENT PLAN	Catalog Item	2/13/2009	3		<a href="#">View/Add Notes</a> <a href="#">View Item Details</a>
APPEL-LIFECYCLE, PROCESSES, AND SYSTEM ENGINEERING	Catalog Item	2/13/2009	3		<a href="#">View/Add Notes</a> <a href="#">View Item Details</a>

Click **View Item Details**.





# Make Comments

Once you have viewed the IDP, you can add comments to any goal, activity, and/or the plan as a whole.

To add notes, click the **View/Add Notes** button next to the section on which you'd like to comment.

SHORT-RANGE GOALS: 1 YEAR

Goal Name ▲	Target Date	Priority	Related Competency	Action
▼ Systems Engineering	2/13/2009	3	Systems Engineering (Level 1 Competency)	<a href="#">View/Add Notes</a>

Description:

Development Activities ▲	Type	Target Date	Priority	Target	Action
APPEL-DEVELOPING AND IMPLEMENTING A SYSTEMS ENGINEERING MANAGEMENT PLAN	Catalog Item	2/13/2009	3		<a href="#">View/Add Notes</a> <a href="#">View Item Details</a>
APPEL-LIFECYCLE, PROCESSES, AND SYSTEM ENGINEERING	Catalog Item	2/13/2009	3		<a href="#">View/Add Notes</a> <a href="#">View Item Details</a>

Click **View/Add Notes**.





## Make Comments (cont.)

The **Comments** page allows you to view any comments that have already been added to the selected section.

Comments can be made by the employee, supervisor, or by a coach or mentor. To add your comments, type the text in the box provided and click **Add**. If you choose not to add comments, you can exit by clicking **Back** at the top of the screen.

A screenshot of a web interface for adding and reviewing comments. The interface is divided into two main sections: "Add Comments" and "Review Comments".  
The "Add Comments" section has a large text input box. A green arrow points from a callout box "Enter comments." to the input box. Below the input box is a blue bar with the text "Click **Add**.". A green arrow points from this text to a button labeled "Add", which is circled in green.  
The "Review Comments" section shows a list of comments. A green arrow points from a callout box "View comments." to the first comment. The first comment reads: "Coach/Mentor, Nasa, Jane - 12/21/2007 02:47 PM EST Please let me know what I can do to support your application!"





## Summary

- A coach or mentor may be asked for assistance in the **Prepare** and **Finalize** phases of the IDP process.
- New functionality in SATERN allows the mentor to view IDP details and provide online feedback on a mentee's IDP.
- It is important to discuss what assistance the mentee requires and to establish agreement on the timeline and method for feedback. There are no email notifications regarding mentor feedback.
- Additional information can be found at <https://saterninfo.nasa.gov>